OVGTSL NEWSLETTER

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2013 OVGTSL NEWSLETTER THE OHIO VALLEY GROUP OF TECHNICAL SERVICES LIBRARIANS

The annual conference of the Ohio Valley Group of Technical Services Librarians has drawn to a close. I am delighted to have this final opportunity to thank all the presenters of the pre-conference and conference; the excellent content of your presentations made the conference a success.

I would also like to thank the hard working and creative Conference Planning Committee: Pennie Centers, Laura Edwards, Victoria Koger, Krista Rhodus, Kelly Smith (treasurer), Amy Tabb, Carol Thomas, and Kathryn Turnbull of Eastern Kentucky University Libraries, with contributions from Ruthie Maslin, director of the Madison County Public Library, and Mary Beth Bonet, Calvin Gross, and Patty Tarter of Berea College. Special thanks go to Melissa Abney, of EKU Libraries, who designed the elegant conference logo and the printed conference program. I thank all of you who have contributed reports to this newsletter. Your reports accurately reflect the presentations and their themes of meeting challenges and leading change in technical services libraries nationwide.

Our sponsors helped us to make the conference a success; to see who offered the conference that support, go to the conference website: <u>https://sites.google.com/site/ovgtslconference2013/home</u>

Want to review presentation content? A number of presentations are now accessible online under conference programs: <u>https://sites.google.com/site/ovgtslconference2013/program</u>

Please plan to attend the 2014 conference! The dates for "Local Talent, Global Impact" are May 28-30, 2014; the conference will be hosted by Ohio University in Athens, Ohio.

Warmly,

Margaret Foote

2013 OVGTSL Conference Chair

2013 Annual Conference Newsletter Volume 26 (2013) – ISSN 1075-363X Newsletter editor: Margaret Foote **Preparing to Meet RDA Challenges: A Practical Approach** Andrea Morrison, Cataloger, Indiana University at Bloomington Taemin Park, Faculty, Indiana University at Bloomington

Reported by Natalie Bulick

The preconference was divided into four segments with time for questions and answers at the end. Taemin Park presented the first two sections: RDA Challenges: What You Need to Know about Using RDA Bibliographic Records, and Cataloging Challenge: How is Publishing, Distributing and Manufacturing Information Recorded with RDA? Andrea Morrison presented the last two sections called: Expressing Relationships between Works, Expressions, Manifestations and Items with Resource Description and Access, and Meeting the challenges of RDA implementation at Indiana University, Bloomington.

In the first section, Park provided an introduction to FRBR terminology in RDA and RDA Structure. She illustrated how to identify RDA records by recognizing RDA elements and explicit relationships stated in records. Park follows with brief coverage of ISBD, how to treat sources of information, transcribing data in RDA records, and RDA core elements. As is always the case with cataloging, there are exceptions to consider and Park discussed them in some detail. For example, the "Take What You See and Accept What You Get" principle marks a radical change from AACR2; however, institutions retain the right to establish in-house cataloging guidelines. To complete this portion of the presentation, she identifies terminology differences in AACR2 and RDA, provides an introduction to the RDA Toolkit, works through RDA Examples, and finishes with Library of Congress (LC)-Program for Cooperative Cataloging (PCC)-Policy Statements (PS). In the second segment of the preconference, Park discussed general imprint information and the new MARC21 field 264 which replaces the 260 field and allows for more detail. The discussion was divided into five areas of imprint information in RDA: Production statement, Publication statement, Copyright date, Distribution statement, and Manufacture statement.

Morrison began the last half of the preconference with a background on relationships in RDA, and expressing relationships explicitly in bibliographic records, either by using notes, identifiers, or authorized access points in order to indicate relationships between works, expressions, manifestations, and items. In the final portion of the presentation, Morrison discussed the RDA implementation process at Indiana University, Bloomington. Topics covered include the formation of an Indiana University system wide team, preparing for RDA with the purchase of tools and attendance at webinars, and the RDA testing period from October 1 through December 31, 2010. In July of 2011, Indiana University, Bloomington Libraries appointed the RDA Training and Implementation Committee members which met every two months. The members worked to identify local policies decided for print monographs, and design an in-house training program based on the Library of Congress training materials, Program for Cooperative Cataloging training materials, and the RDA Toolkit. At this point, training documents were created and four intensive

training sessions were held. After initial training was completed, evaluations were used to improve success, and RDA changes were continually tracked with documentation updated.

Metadata Management: The Road Behind and the Road Ahead

Ted Fons, Executive Director of Data Services and WorldCat Quality Control at OCLC

Reported by Mary Ann Abner

Mr. Fons challenges librarians to think of library users as metadata consumers. The problem lies in access to library collections. We must find ways to get users to our content, but collection access is fractured. Additionally, a generation gap exists – one that works both ways. College students are very wired, but they are not using library sites outside the library portal. The problem is not of non-usage of the library catalog but of considering how we can fix the catalog. Access to our collections is imperfect because we don't express our collections well on the web.

How do we improve exposure of our data on the web? First, aggregate: gather collections at the network level. This will make our data more attractive to the web. Second, syndicate: make data available to the web by demonstrating its value. Third, entification: change the way we describe our data to extract what is most interesting to consumers. There are valuable entities hidden in our data.

Improving the value of our data will require cooperation. Librarians can get started with web sites like schema.org. We need to think in terms of local, regional, and global catalogs when envisioning how to manage entities. The web wants to know about people, places, and things.

The requirement for this undertaking will be managing all of the data – not just books and journals. Librarians must use authority files. A good example is VIAF which brings together high quality authority data. We can all participate by contributing to shared cataloging to shared authorities management.

Library as Open Access Publisher: An Overview for Technical Services Librarians

Mary Beth Thomson, Associate Dean for Collections, Digital Scholarship & Technical Services, University of Kentucky Adrian Ho, Director of Digital Scholarship, University of Kentucky

Reported by Rhonda Wiseman

The University of Kentucky is making great strides in keeping pace with the growing trend within libraries to provide publishing services that directly support open access publications for scholarly communication. Open Access (OA) content is generally unrestricted in access and use in addition to being free of charge and free of most copyright and licensing restrictions. Additionally, it is quickly

becoming the standard for publishing academic content. The Library Publishing Coalition (LPC), a community driven project encompassing over 50 academic libraries, defines library publishing as a "set of activities led by college and university libraries to support the creation, dissemination, and curation of scholarly, creative and/or educational works". Collaboratively providing access to open journals and creating in house journals requires weighty consideration of platforms, cost management, system maintenance, skills assessment and more. An online guide to publishing open access journals can be found at http://www.doaj.org/bpguide/.

Common online journal publishing platforms include:

Digital Commons DPubS DSpace EPrints WordPress Open Journal Systems (OJS)

By providing free digital content via library collections to scholars, students and researchers, technical services departments are tasked with cataloging, maintaining and creating the metadata associated with OA content in addition to handling the payments for platform services through acquisitions. Ideally, the journal team would be able to manage the entire process of content creation. The University of Kentucky technical services department supports library publishing service activities through specific channels of communication coupled with streamlining the new skills and functions associated with managing OA content. TS is responsible for setting policies for hosting online materials in addition to creating policies for student/faculty networks who create in house journals. Additionally, TS is also responsible for supporting content management. That is, promoting, ISSN requests, registering with the Directory of Open Access Journals, adding title(s) to the online catalog and WorldCat and directly working with vendors to feed the metadata of published articles into web based discovery tools. Furthermore, preserving online content for futurity is also a TS job. Future directives and user needs will continue to alter the climate of OA accessed materials in academic forums requiring technical services departments to continue to meet the demands of an ever changing organizational landscape.

Using the Tools in the CollaboraTeS Toolbox to Get Work Done

Margaret Maurer, Head, Metadata and Catalog, Kent State University

Reported by Marsha Seamans

The OhioLINK CollaboraTeS was developed to address the issue of managing cross-institutional technical services workflows or needs for expertise. It established a methodology for collaboration by identifying those individuals or institutions that have expertise and those who need expertise in

such things as subject areas, foreign languages, technical skills, and specific formats and schemas. The toolbox is available at http://platinum.ohiolink.edu/dms/collaborate/. Only OhioLINK users can access the inventory itself.

Ms. Mauer placed the context of collaboration within change management strategy, and outlined features of successful collaboration including support and buy-in by administration and staff, good project planning and management practices, communication, and trust.

Many technical services tasks lend themselves to collaboration. The starting point in developing collaborative projects is planning, including determining if you have the appropriate staff to carry out the project, and considering if it is more cost effective to outsource. Locating a partner for a project can be challenging since directories of technical services skills generally do not exist. Once a partner is identified, take time to build trust.

In implementing a collaborative project, don't assume that someone else will see things the same way that you do; specifications and workflow need to be defined, and authorizations and transmittal methods need to be established. Project coordinators are needed at both ends and the process has to be agile enough to respond to continuous evaluation. Defined and agreed upon timelines are important, as well as regularly scheduled communication and assessment.

Another aspect of collaborative projects is determining methods of compensation. Payment parameters and methods need to be defined, whether bartering, non-cash "tokens" or cash, and compensation needs to reflect the level of expertise needed. Costs may be both direct (e.g. salaries) and indirect (e.g. office supplies). Other tools for determining compensation could be estimating (in the case of less formal, more short-term projects), finding out what a vendor charges for a service, or searching the literature for what others have done. In some cases, particularly for adhoc services, there may be no charge.

Writing a memorandum of understanding (MOU) is an important step in a collaborative project. The MOU should focus on the service being delivered, state what is needed, define the mechanics and process of fulfilling those needs, delineate local standards and practices, describe the quantity of work, define the ways of measuring the work, state compensation agreements, provide contact information for project coordinator(s) and define deadlines for and duration of the project.

Ms. Mauer sees a bright future for collaborative technical services and suggests that creating an inventory of technical services expertise is important in fostering collaboration. The CollaboraTeS Toolkit, in addition to providing an inventory of expertise for OhioLINK, also provides a set of supportive tools to assist others in those efforts.

The Best of Times? The Worst of Times? Implementing Blacklight at Indiana University Libraries

Tina Baich, Assistant Librarian, Indiana University-Purdue University, Indianapolis Courtney Greene, Head, Digital User Experience Department, Indiana University, Bloomington

Reported by Julene Jones

The Indiana University Libraries system is composed of eight campuses with approximately 8 million records and 15 million items and recently implemented the open source Blacklight discovery layer with their Sirsi Dynix Symphony ILS. This flexible discovery layer allows each of the diverse campuses across the system to be served effectively. The implementation taskforce considered two open source discovery layers, Blacklight and VuFind. Both were considered acceptable, but Blacklight was chosen because of its flexibility and helpful development community. The taskforce developed requirements for the discover layer, including:

The ability to create campus specific, customizable views

User-authentification at the point of need

Permanent, stable URLs for search strings

The ability to create lists of records that could be emailed or printed

The ability to generate formatted citations and to export them to specific software packages

Availability of RSS feeds for searches or new titles

The ability to sort search results

Faceted searching

Single search box

Displaying the item format on the search results

Displaying a call number for each location

The discovery layer was introduced to the library staff during a preview webinar, and to users through announcements on the library website. There will be further marketing and training at an upcoming workshop at the state-wide [Indiana] conference, Librarian's Day.

User feedback about Blacklight has included identifying dirty data to cleanup, reports of problems when searching by call number and when using ezproxy as well as the desire for sorting by shelving location.

The presenters plan to hold additional user testing groups, to make additional observations and to have an accessibility review. They would like to integrate their ILL system with Blacklight and to integrate other library materials (i.e. some digital collections) into Blacklight that do not currently display in their library catalog.

Desperate Times Call for Strong Partnerships

Marcia Barrett, Head, Technical Services, University of California Santa Cruz Christy Hightower, Collection Development, University of California Santa Cruz Varvara Paizis, Library Acquisitions, University of California Santa Cruz Kerry Scott, Head, Collection Development, University of California Santa Cruz

Reported by Mykie Howard

The speakers for this session from the University of California Santa Cruz gave an inspiring presentation on how they "rose from the ashes" like a phoenix to overcome a major budget and staff deficit by moving their traditional English language print approval plan to demand driven acquisitions (DDA). The UC Santa Cruz DDA Project Team had weekly meetings using video Skype, Google hangouts, e-mail, and the phone. They also utilized Google Docs to create and maintain project files. Since they were not all in the same physical location, this technology helped greatly and ensured that the best people were on the team. A project-based approach was taken using a project planning template including why they were doing the project, the context of the project, the project proposal, and impact statement of the project.

Similar to a lot of library approval plan purchases, the circulation statistics of UC Santa Cruz's approval books were not great. In fact, 65% of their approval books were not getting used at all, and another 23% only circulated once. Therefore, deciding to dedicate approval plan money towards DDA was the logical, easy answer to their budget and staff shortfall. The project team soon realized that DDA would allow for more precise data driven decisions, create a shift in outreach opportunities, and allow for more collaboration between faculty and librarians. It also increased communication with all stakeholders (including staff members, patrons, and vendors). Vendor communicated internally and under communicated externally. The DDA Project Team members decided to allow YPB to manage DDA and chose EBL as a primary vendor. They also decided to open the entire profile to all constituents, to provide on campus access to community and campus users (asking for self-identification before use of an e-book), to have a preference of e-books over traditional print books when available, to not reveal the purchase price to users, and allow a book to have three short loans before it is actually purchased. Records were added to the "Cruzcat" catalog for discoverability, including 856 access links for purchase and 793 title hooks.

Moving from the print approval plan to electronic DDA decreased some of UC-Santa Cruz's collection activities while increasing activities in other areas, such as loading three times the number of bibliographic records. The workflow became more faceted as well. In the future, the DDA Project Team hopes that DDA will become system-wide in the UC schools and that they can

move to a print DDA model, ultimately creating a more relevant and accessible collection for all users.

The Transformation of Technical Services to Knowledge Management Services Lois Schultz, Head of Knowledge Management Services, Northern Kentucky University Justine Burchell, Extended Collections Services Librarian, Northern Kentucky University

Reported by Debbra F. Tate

The youngest of Kentucky's eight state universities, Northern Kentucky University – incorporated in 1968 – has grown to an enrollment of nearly 16,000 students and offers over 90 academic programs, including a number of graduate programs. NKU's Steely Library provides a diverse collection of print, electronic, and microform resources and currently has a materials budget of \$1,168,594. This presentation outlined the history of technical services in the library and the gradual transformation of those units into the division known today as Knowledge Management Services.

The library initially had a traditional, siloed organizational structure, with each unit reporting to the library director. Under new leadership, in 1984, divisions were formed. Over the ensuing years, some units have merged or transferred from one division to another and new units have been created, all in response to changing local needs and the shifting landscape of library services at large. Staffing has been similarly affected, with positions lost or gained as appropriate.

Recent changes have been driven, in part, by budgetary constraints and rising journal costs, in addition to evolving philosophies of collections and services. The library was able to implement cost efficiencies by moving primarily to online journal subscriptions and canceling high-cost, low-use titles in favor of obtaining articles on an as-needed basis. The increase in electronic resources in the library's collections led to a corresponding shift in emphasis from creating and maintaining physical collections to providing the best possible service in managing knowledge for users. The Technical Services division was re-named Knowledge Management Services to reflect this new focus.

Among the innovations in service are: purchase of any faculty/staff/student-requested item (up to seven each year per person, with a \$100 limit per item) in addition to items purchased through regular departmental allocations, unmediated interlibrary loan for items (with plans to include articles in the future), information brokerage for articles not easily obtainable through ILL, and document delivery of articles available at the library. There are no limits on the number of articles a patron may request, or on the cost. Further improvements include streamlining of ordering and cataloging procedures to ensure rapid turnaround time. The goal of Steely Library's Knowledge Management Services is to give users what they want and need as quickly as possible.

Schultz and Burchell pointed out that changes in organizational culture take time and commitment and that encouragement and support from administration are key.

Closing Divisional Libraries in a Changing Academic Landscape

Susan Elliker, Data and Materials Management Librarian, University of Michigan

Reported by Kathleen Richardson

The University of Michigan's administration decided in 2009 to close the Social Work Library, which was located in a purpose-built, relatively new location dating to 1998. A combination of factors led to the decision: budget, the subject area, and users. Social work is an interdisciplinary area. The University's social work program celebrated its 90th anniversary in 2011, and the School of Social Work's graduate program, established in 1951, is highly ranked nationally. The School had moved from a house to the Frieze building, and then to the purpose-built School, with a library to support its MSW and doctoral programs. The collection contained over 45 thousand books, 160 journal titles, theses, dissertations, a collection of works by faculty, and audiovisual materials such as recordings of social work clients and class sessions. The library's facilities, which were on the lower level of the building and featured art work and computer workstations, saw high use and was known among the University's students as a good place in which to study.

Why close a high-use library? Recent research indicates that branch library services may be less useful in interdisciplinary areas, such as social work, than in strictly-defined subject areas. The SWL's collection did, in fact, cover many subject areas, as do the academic backgrounds of the school's students in the School of Social Work. The campus libraries were buying many duplicate titles to accommodate cross-disciplinary collections, and the library literature indicates the cost of print storage (\$4.26-\$56.20/volume/year on open shelves) and the cost of use of journals (\$30/use of print journal versus \$2/use of an e-journal) are part of administrative considerations in collecting and use of facilities.

Changes within general library services were coming into play in these decisions. Budget amounts were moving with journal subscriptions. Older faculty mourned the loss of browsing the shelves. ILL users might visit every day, with a same-day or 24-hour delivery service. E-reference sources replace paper sources. The library's Web page acts as a content manager. Cost savings come with reduced staffing: closing the SWL eliminated costs for student workers; the public services librarian moved to the Graduate School Library. In addition, staff space was under pressure to become public space, including tech services space, which became space for display, events, and a small classroom.

The SWL was open during the "shrink wrapping" of the shelving and collection to "freeze" it during the period of September through December. The plan to disperse the collection included withdrawal of duplicate copies (duplicated elsewhere on campus) published prior to 1990 and to transfer post-1991 duplication to the Flint campus. Holdings in the Aleph-based catalog, "Merlin," were updated; 3500 went to the Public Health Library, 4000 to the Graduate School, and other to Buhr Remote Shelving. Room on the shelves of the receiving libraries, however, had to be made, so the plan also involved withdrawals of titles from the Public Health and Graduate Library collections and transfers to Buhr to make room. A number of titles were in temporary storage, in fact, while the global changes were taking effect in Merlin. The plan included moving all books to Buhr by December 21st; the fallback was to rely on a moving company to handle the remainder of the move between Christmas and New Year's Day. High-use titles (250) were sent to the Undergraduate Library for use during the move, as shrink wrapping them as part of the collection was not feasible. In short, the collection had many, widely scattered destinations.

The Materials Control Unit handled the processing. A degree of collaboration between libraries and among staff was required: a graduate student estimated the processing time; desktop support was required for barcode scanners and other equipment; undergraduate student workers worked on journals; staff handled packaging and moving. Mild fall weather made wheeling book trucks across the street for relabeling at the Graduate School Library's worksite easier. A simplified withdrawal procedure was developed: "If in doubt, go to your supervisor," for such things as item status code "last copy" and other questions past the "simple" level.

The withdrawals totaled 7600 from the SWL, 6500 from Public Health, and 2300 from the Taubman Medical Library. One end result of the whole project was more accurate records in Merlin. Another result was the sheer mass of discarded paper represented by damaged or otherwise unusable materials, which Campus Recycling handled with an outside company, Nelson Paper Recycling. Pick-up and delivery cycles of big bins were crucial; the bins had to be covered, as staff members were concern over the appearance to outsiders of discarding many books. Better World Books and Zoogle took some withdrawn materials, as well.

The processing turned out to be anything but a slow, steady stream—it was a gusher instead. Storage during processing was another crucial issue. Student workers needed supervision, and the situation was wild at times. The collaboration, fortunately, was enjoyable; not "fun," but certainly energizing.

At the end of the project, the student left in December. On December 18th, the last item handled by a staff member was boxed before the semester break. The professional moving company came in. In the spring semester, the former SWL space became a group study/meeting area. Strangely enough, the space was still listed on the campus's list of 2012 "best places to study" as the Social Work Library.

In assessing the effects of the project, some benefits were perceived: record clean-up, inventory; some effects on digitizing efforts; the Flint campus received many titles; isolation ended for the Social Work students, librarian, and faculty who moved on to other libraries; and the move expanded faculty members' knowledge of other librarians' relevant subject expertise. The project

also expedited processes for future library closures, and interestingly, the closure of the Public Health Library was announced in January 2010—one month after the SWL closure. Again, that library's collection was moved to another library's storage space for processing. A cascade of subject library closures has occurred on the UM campus since then, sometimes as a result of building renovations or changes in collections. The Taubman Medical Library, for example, relies heavily on electronic resources and retains only minimal print resources in-house. The remainder of the collection is in off-site storage or has been moved to special collections.

Rare Books Cataloging Toolkit: An Introduction

Marisa Cathcart, Special Collections Catalog Librarian, Indiana State University

Reported by Melissa Brooks

Marisa Cathcart opened this informative presentation on rare book cataloging by defining the rare book from more standard materials. In this definition she describes what information is added to rare book MARC records; these include extra descriptive fields in the 5xx-7xx and specific manuals that have been created to work with these materials like DCRM (Descriptive Cataloging of Rare Books) and AMREMM (Descriptive Cataloging of Ancient, Medieval, Renaissance, and Early Modern Manuscripts). Even though a set of manuals and information on adding extra information exist, there are other aspects of rare book cataloging that must be accessed in the creation of MARC records and this includes the addition of a new set of cataloging rules in RDA. Marisa stated that the rare book cataloging community is further ahead than other cataloging communities because of all the information that is already added to a rare book record. As the presentation progressed introductory websites and resources were presented; all will be of great help to beginning and more experienced rare book catalogers. The sites discussed include information on bindings, font types, the book trade, and language information. This presentation contains many links to resources that are helpful in cataloging, and I recommend reviewing this presentation to acquire this information.

Changing Landscape of Technical Services: Perspectives from Acquisitions and Cataloging

Kate Seago, Director, Acquisitions, University of Kentucky Marsha Seamans, Director, Cataloging and Database Integrity, University of Kentucky

Reported by Natalie Bulick

Seago and Seamans analyze how Technical Services departments are evolving to meet demands in a time of continual transformation through an overview of hot topics such as technology, user expectations, resources, ownership versus access, changing and developing standards, as well as their own expectations as library professionals. As library managers in Acquisitions and Cataloging

at the University of Kentucky, they discussed how they led their respective departments through the adoption of challenging new standards and practices such as Resources Description and Access and demand driven acquisitions.

After presenting an overview of the general landscape in which Technical Services departments now find themselves operating, Seago provides a more in depth analysis and discussion of her experience as Director of Acquisitions at the University of Kentucky, providing guidance and leadership for her departmental staff. Libraries are acquiring an ever-increasing volume of electronic resources, and shifting from a materials ownership mindset to a providing access if needed practice. As her department adopted demand driven acquisitions and other technology driven processes, Seago recognized staff skills also changed and it is essential to provide them with training and support in order to have a happy and successful team. However, she also acknowledges the importance of taking a macro view of the organization with an eye toward hiring strategically as positions open and developing a culture of change.

In the final segment of this presentation, Seamans, Director of Cataloging & Database Integrity at the University of Kentucky, paints an accurate picture of cataloging in our current environment. The topic of relevance is on the mind of catalogers, but it is nothing new. She illustrates this point by quoting "The Crisis in Cataloging: a Paper Read Before the American Library Institute at the Harvard Faculty Club," written in 1941. Seamans asserts the way catalogers title themselves matters and that adopting new names should reflect the addition of new technology related responsibilities, in addition to traditional assignments. Cataloging more electronic resources, while watching a steady decrease in the acquisition and cataloging of print materials. They must learn new skills and define new workflows. In addition to learning new standards and how to catalog new material types, catalogers are perfectly placed to learn new metadata skills and collaborate on digital projects. Seamans also urges librarians to, "throw out assumptions, both inhouse expense and outsourcing 'evils'." She mirrors Seago's macro view of organizational development and insists on the importance of redefining positions as they become vacant, as cataloging positions are less likely to be filled in the future.

Various Sides of RDA: Name Authorities, Serials, and Public Services

Panel presentation report by Marcia Barrett

This panel presentation addressed aspects of RDA that have had less attention than topics such as general training and benefits of the move to RDA.

Name Access Points in RDA for Non-NACO Catalogers

Leslie Engelson, Technical Services Librarian, Murray State University

Leslie Engelson, a NACO cataloger, explained that with a purpose of identifying, rather than merely differentiating, RDA authority records will have more information than AACR2 authority records. Some new information in authority records, such as biographical or historical data, will be

accessible to the public. In addition to resources for creating RDA authority records and the timeline for updating AACR2 authority records to RDA, Engelson's presentation contained a good overview of elements in RDA authority records with instructions in RDA for creating those elements.

Are You Ready to Bridge to FRBR/RDA Serials Cataloging?

Taemin Park, Faculty, Indiana University, Bloomington

Taemin Park discussed what aspects of serials cataloging carry over from AACR2 to RDA. The definition of a serial does not change with RDA, and serials catalogers have experience recording notes and linking fields. RDS is built on the FRBR model, which is new for serials catalogers. Park's presentation related the FRBR model to serials cataloging with sections on identifying manifestations, identifying works, and identifying expressions.

"That Thing with the Letters": Talking to Public Services Staff about RDA

Diana Nichols, Monographs Cataloger, Ohio University

Diana Nichols shared resources from an RDA informational campaign for staff at Ohio University. In communicating with staff about RDA, technical services librarians should consider what staff needs to know and can use surveys, presentations, and Q&A sessions to educate library staff. Staff should understand what RDA is, why it is being implemented, and how the catalog will be impacted by this change. Examples are important.

Who Do We Think We Are? New Roles and Workflows for Technical Services

Reported by Caroline L. Gilson

Going with the Flow Works, but Shaking Things Up Can Work Even Better: Updating the Work Flow within Technical Services

Kathleen Baril, Collections and Electronic Resources Librarian, Ohio Northern University Kelly Kobiela, Systems Librarian, Ohio Northern University Jenny Donley, Catalog and Serials Librarian, Ohio Northern University

Redefining What "Technical" Is: New Roles for Technical Services

Roberta Winjum, Associate Dean, Technical Services, Vanderbilt University

You may be familiar with the saying, "The only constant is change." This is indeed true in technical services in libraries. Change is happening at a fast clip: in technology, in staffing, in workflows, in skill sets. The two presentations in this panel pairing described challenges in changes to work

flows and staffing, and how choices were made to adapt and evolve with needs at their academic libraries.

First, Kathleen Baril, Jenny Donley and Kelly Kobiela of Ohio Northern University discussed rearrangements to their tech services areas. Before library restructuring, the management style was very "top-down"; in place for decades and was much formalized. Library staff simply did not work together on projects, there was a lot of "That's how it's always been done" or "That isn't my department" or "These are our department's office supplies."

Baril, Donley and Kobiela were all hired over the past 4 years, which brought an infusion of new ideas, new management styles/ideas to create a unified tech services department. Some staff left due to retirements or other on-campus employment opportunities. This led to hiring new staff with new skills/more tech knowledge. Staff changes also encouraged librarians to address workflows. This is critical in tech services, especially as technology evolves.

The three presenters also talked about the "fear of change/fear of the unknown" for some of the staff members. As workflows were examined and changed, some job descriptions changed. This process included conversations with HR, looking at individual strengths and weaknesses, being sensitive to people's feelings, and considering which jobs would be changing the most. Also important: giving credit to staff for what they were doing. There was also an opportunity for cross-training, and staff collaborations were encouraged and recognized. For the most part the staff was on board. Supervisors gave staff opportunities to reach out via a comment box (in case someone wanted to ask a question or make a comment privately). Monthly staff meetings were started to encourage communication, talk about any issues. A Tech Services blog was created to post library-wide meeting minutes and other news and reports. A central location for all office supplies was established, with everything available to everyone. Artwork was selected by the TS staff and hung in common office areas.

Future plans include: looking at workflows every 2-3 yrs.; Aligning goals and workflows with the library strategic plan (current director is retiring within the next few months); request master keys for everyone in tech services; create workflow charts for all staff, encouraging staff to take initiative and co-collaborate on new projects and improvements.

The second presenter, Roberta Winjum of Vanderbilt University, discussed transition and new roles for technical services. Despite changes, there is still an abundance of technical work to be done, and we need our staff to fill new roles. Changes are happening in all departments (public services, collection development, IT), and also user expectations are changing. There are also changes in availability of information, and library leadership is thinking about return on investment, the VALUE of libraries.

Impacts in tech services include less traditional work with print, less ordering, cataloging, check-in, binding, marking. Taking their place, there are new tasks: managing electronic resources, patron driven acquisitions, digitization, and new forms of metadata to organize. With a decrease in traditional work comes a chance for new roles within new initiatives, including digitizing projects, metadata creation to go along with new forms of scholarly communication, discovery layer

mapping, assessment, licensing management, PDA management, print on demand projects, collection management projects.

Obstacles along the way may include resistance to change, being overlooked, and lack of focus for new assignments. Reassignments can be hard for staff: some will go along with the change, some will hate change, and some will accept it if they understand "why".

What's in a name? It's not Technical Services anymore: How about Discovery Services. Collection Services. Resource Access Services. Collection Management. Knowledge Access Management. (Winjum welcomes additions to her growing list of new names!)

The Joys of Weeding, or, The Art of Deselecting Library Collections

Reported by Kathryn R. Bartelt

Coping with a Legacy Print U.S. Documents Collection

Donna R. R. Resetar, Associate Dean of Library Services, Valparaiso University

Donna Resetar presented an informative session on a project to identify and dispose of items from the print U.S. documents collection housed at Valparaiso University. The impetus for the project was the need to increase study space—specifically individual study carrels— for library users. The goals were to reclassify monographs from the SuDocs classification to LC, transfer serials to the automatic storage and retrieval system (ASRS), deselect the remainder of the collection to create study space, and to complete the project in one year.

Valparaiso University Library historically housed its U.S. documents print collection in the open stacks in SuDocs number order. By 2004, after a move into a new library, the collection of approximately 23,000 items was increasingly dated, not easily browsed, and was not circulating. By 2008, in the typical shift from print to digital access, the documents collections had become a virtual depository.

Resetar reviewed regional depository disposal rules and established guidelines for retention and disposal of material. Items to retain included scholarly material of lasting value, useful publications that strengthened weak areas of the collection, historically significant reports, primary research materials that supported the curriculum, and items that were at least 20 pages long.

Subject liaisons were assigned SuDoc number sections and a schedule was established for each librarian to review his section. Librarians followed the guidelines and focused on what items should be retained rather than being concerned about what would be discarded. Slightly over 20,000 items were deselected and recycled. By eliminating the separate SuDocs collection, the library anticipates increased use of retained documents, a smoother workflow in technical services, and additional student space.

In the future, plans include subject liaison collection review responsibility, annual evaluation of the print selection list, reclassification of any new print documents over twenty pages and retaining smaller print documents in the SuDocs location no longer than five years.

Weeding without Gardeners: One Library's Experience Weeding without the Benefit of Subject Specialists

Amy Butler, Acquisitions Librarian, University of North Alabama Darlene Townsend, Technical Services Librarian, University of North Alabama

Librarians at the University of North Alabama's Collier Library determined that weeding the collection was necessary to reduce collection size for future growth and increase floor space for other services.

The librarians considered the biggest challenge to a weeding project to be the small professional staff and a lack of subject specialists in this group. These factors led to collaboration with Sustainable Collection Services (SCS). Criteria to identify titles for possible withdrawal were established by the librarians. Criteria included most recent circulation date, publication date, and the number of libraries holding the item in the US. SCS used the criteria to filter the library's data and create lists of withdrawal candidates.

Librarians then invited teaching faculty to review withdrawal candidates (either in person or using online lists) and provide feedback on whether titles should be retained. Faculty response to the project has been disappointing; however, faculty recommendations are being carefully considered.

The weeding project continues with adjustments to the procedure ongoing.

There's a Goat in My Keynote: What a Baby Goat Taught Me about "Network Power" and Implications for Libraries

Kathryn Harnish, Director for Network Experience at OCLC

Reported by Mona Meyer

As the co-owner of a small dairy farm in Maine, Kathryn posted a cute 65 second-long video of her goat, Buttermilk Sky, to YouTube. The video quickly went "viral" with 1364 views the day before this happened. Buttermilk Sky now has over 10,000 "friends" on Facebook, too. To help deal with all this attention and requests for more Buttermilk videos, she contracted with the Viral Spiral organization. Production companies contact Viral Spiral to get access to videos to use in advertising. Looking at the popularity of media like YouTube, with 4 billion hours of videos watched each month, Kathryn began to consider how such data could be leveraged to help libraries. A hedge fund used Twitter to predict the stock market, correlating positive words in tweets and bull markets with 87% accuracy. Looking at regions of the world where there are many Google searches on "flu" can highlight flu epidemics in those regions. Even in huge swaths of data, new technology can let us discover trends. We can also mine information from the connections between

entities in a network: for example, you can compare your library's collection with others', and possibly use this information for cooperative collection development. Usage data helps us make better recommendations for users services. A library is said to be operating at web scale when it is no longer bound solely by local issues, but can effectively leverage the power of the Web.

Forging Collaboration Outside of the Library and into the Alumni Office: Increasing Alumni Engagement by Meeting a Growing Information Need Stephanie Faulkner, ProQuest

Reported by Margaret Foote

How can libraries and their universities continue to connect with students who, having graduated, are now "unaffiliated researchers"? The newer graduates in particular are accustomed to using online resources, and may still need these resources as they begin to build their careers. Udini Online, from ProQuest, can assist in development a lifelong partnership between the university and its alumni by offering to the latter the ability to locate, access, and utilize a body of research materials. Udini, an annotation and collaboration tool built and stored in the cloud, is an alumni engagement tool that offers discovery of content through the web. Though Udini the university's alumni can create "myLibrary," just as they do with YouTube, and can then download and annotate PDFs of articles from a database that currently contains over 150 million articles from 12,000 publications. The Udini Alumni Access Program offers customized branding for a university, provides alumni with free and discounted content, and gives the university insight into alumni interests.

There's an App for That! Or Is There?

Emily Krug, Emerging Technologies and Cataloging Librarian, Somerset Community College

Reported by Margaret Foote

In today's technological world, apps are ubiquitous. They are useful and they are easy to download onto a mobile phone or a tablet. One can find apps for the obvious, such as Facebook or Twitter, or the not-so-obvious – for instance, there is a metronome app for musicians to use.

But what about apps for libraries? Emily Krug asked this question and set out to find some answers. She began her search last December with a simple query to Autocat, a major listserv for

catalogers. The responses were few at that time, but in April, when she asked the question again on Autocat, she received some excellent recommendations. She then went on a search for library apps and librarian apps, in particular apps from ALA, OCLC, and LC. She discovered that ALA has created several librarian apps, including YALSA Teen Book Finder, Booklist Review of the Day, and Direct Dispatch Text Alerts. OCLC expressed interest in exploring the creation of apps for librarians but does not have anything specific drafted yet. LC does not seem to be aware of apps and their possibilities for libraries and librarians.

Krug also discovered several other apps: ShelfLister, which works only with the Voyager ILS, Mendeley Reference Manager, PerfectOCR, and ShelvAR. Several other useful tools for librarians, even though they are not library specific, include Evernote, Dropbox, iAnnotatePDFs, PocketCloud, Prezi (for presentations, including Krug's), and several note taking apps, such as Notability, Paperdesk, and AudioNote. In looking to the future, Krug recommends the creation of apps for LCSH and LC classification schedules, RDA, shelf-reading, and advocacy. To create an app, try using AppArchitect. Perhaps the time has come for technical services librarians to create some apps that all can use to make cataloging and other technical services tasks easier.

Making Your Metadata Work for You

Jessica Hayden, Manager of Resource Planning & Description, University of Northern Colorado Alexander Papson, Metadata and Digital Services, Librarian, University of Notre Dame

Reported by Natalie Bulick

Hayden and Papson initiated their presentation on metadata with an overview in the basics of linked data outlining how Resource Description Framework (RDF) operates by defining relationships in triples: "Thing A \rightarrow Has relationship to \rightarrow Thing B," and identifying the foundation for the framework: the use of Universal Resource Identifier (URI). Most importantly, this method of linking data is not limited to use within the library field and therefore allows libraries to share their catalog content beyond the confines of the online catalog. While SQL allows search queries in databases, SPARQL query language for the semantic web is currently in use by developers and will open library metadata records to the web. A statistical graph illustrated the decreasing use of library web pages and indicated that libraries must change in order to get data to the users. In addition, this framework built on the foundation of URIs moves away from the fragile text based links to more stable URI based links. Presenters used an application called Facebook Open Graph to illustrate the possibilities of linked data. Open Graph allows the user to tell "action stories" by extracting linked metadata such as favorite musicians of friends. Another example of linked data is the Google Knowledge Graph. The results pulled by this application are displayed on the right side of Google search results. After using more ubiquitous pop-culture examples with which the audience is likely to be familiar, Hayden moved the discussion to Worldcat's implementation of

linked data and how relationships between records around the world are now being defined with metadata vocabularies such as: VIAF, LCSH, LCNA, Dublin Core, LCC, and others available through the Open Metadata Registry. In the final segment of the presentation, Hayden discusses the Bibliographic Framework Transition Initiative and the resulting model called Bibframe. Though it will not happen in the near future, it is hoped Bibframe will serve as a transition from the MARC 21 exchange format to more Web based, Linked Data standards. The presentation ends with an introduction to an application called Viewshare, which **allows** the user to generate **interactive maps**, **timelines**, **facets**, **tag clouds by ingesting** digital collections from spreadsheets or MODS records.

Z-Books: Hunting Down Zombie Ebooks Hiding in Your Catalog Kathryn Lybarger, Head of Cataloging and Metadata, University of Kentucky

Reported by Jaime Pitt

Electronic books have become prevalent in libraries today. Catalogers are not only tasked with adding E-books to the library catalog, but also maintaining them. Maintaining E-book collections can be very time consuming with new additions & withdrawals every month. In addition, maintaining these collections involve hunting down zombie E-books. What are zombie E-books? They are E-book records with links that indicate some type of error including "page not found", "currently unavailable", or "Error-DOI not found". Zombie E-books may also contain a link that requires a login with paid access. The best strategy would be for these records to not even make it into the catalog. However, that usually is not the case. Catalogers can begin to find these records by querying the catalog for distinct hosts. URL's can be modified by deleting proxy information or session information. Some print book records have URL's as well, which also need to be verified. The next strategy suggested was to look for vendor data on additions and deletions. Many E-books companies have lists of new and deleted titles that can be checked. Vendors also provide announcements regarding new titles added by various publishers. Another strategy proposed was to run your URL's through a link checker. The highlight of the workshop was an introduction to Vimdiff (<u>http://www.vim.org/index.php</u>). It is a free and open source program that is available on UNIX or Mac. Vim is an advanced text editor that allows you to compare coding & merge changes easily. Other useful tools include: cURL which downloads web pages, Grep which searches file contents, and SED which reformats files. When zombie E-book records are found, they should be removed from the catalog, the vendor contacted, & the Worldcat master record modified. Hunting down those zombie E-books can be scary, but library catalogs will be better for it in the end.

Digitizing and Describing History for Curricular Use: Opportunities and Challenges for Technical Services Staff

Diana Nichols, Monographs Cataloger, Ohio University

Reported by Marisa Cathcart

Nichols presented a session as a monographic cataloger interacting with a multi institutional project, and the rewards and challenges that it afforded her and her department. A major point that continually emerged in the project was that of interaction and communication with others, whether it was with faculty, interdepartmental interactions, or institutional connections. The project included intermingling five dispersed print collections, and in providing this integrated digital piece, the Voinovich Collection, it has delivered an exhibition space specifically for teaching tools with requested items from faculty members. These items were either previously requested for usage, or else specifically requested from faculty for inclusion at the time of the project. Institutional members included Ohio University, Cleveland State University, the Senatorial Office of George Voinovich, and the Western Reserve Historical Society. Some of the technical services opportunities afforded them through the project, as pointed out by Nichols, included interdepartmental cooperation and working with others, working with collections from other institutions, and providing access to archival materials for curriculum usage, as well as the observable digital exposure to new items. Challenges included distributed partners, having to balance the decision making on the project with other institutions, such as with the metadata, and the actual metadata display.

120 to 12: Reducing Days to Shelf with Vendor Services, Cat-on-Receipt and Automated Bib Overlay

Sherle Abramson-Bluhm, University of Michigan

Reported by Valentine Muyumba

In this presentation, Abramson-Bluhm talked about the journey taken by the University of Michigan library to reduce the days materials spent in Technical Services, from 120 to only 12. She also talked about the challenges along the way. Abramson-Bluhm, a Public Services librarian who became a Technical Services librarian, had to deal with the major reorganization that happened in 2007, which necessitated the combining of the Serials & Acquisitions Division with the Cataloging Division. Priorities had to be set before dealing with and managing the backlog of all materials. She described the size and the workflow of both the Acquisitions & Serials Division and the Monograph Cataloging Division prior to the 2007 reorganization. There was an in-house form that had to be created in order to locate materials that were needed by patrons called "In-Process Locator Service Request Form" or I.P.L.S. This did not speed up the process. With a backlog of 9,000 items, changes needed to be made in staffing configurations and responsibilities, and adjustments in workflow. The only way to deal with the backlog was to reorganize and come with different measures. Not to forget the (est.) 9,000 titles of E-Resources that were also to be dealt with. They combined the Acquisitions/Serials and Cataloging and created the Electronic Resources Units. A flagging system had to be developed and implemented for records needing further work. This was done in collaboration with the library systems staff. The U of M had to decide on using and accepting vendor records and to let go of some of the routines and decide that the cataloging coming from

vendors was "just as good as". Below is a list of some of the things needed to happen in order for the new workflow and re-organization to work:

- The first priority was to get the books to the shelf and consider the R2 program (R2 consulting made recommendations in 2006 on how to go about reducing the backlog)
- Eliminate the backlog of more than 9,000 items
- Create streamlining (eliminate backlogs and queues by adopting simpler, streamlined methods; one subject heading, call number; eliminate manual inscription; eliminate IPLS)
- Elect selection (create an English-language mainstream of monographs, standing orders, and eBooks)
- Export selection records from vendor system
- Automate the mainstream (introduce shelf-ready program for select subjects, such as English; electronic selection)
- Let go of full (clean) records
- Import records to Aleph (LIS) and create brief bibs and order
- Purchase cataloging records and shelf-preparation
- Route to catalogers only those items lacking subjects and call numbers
- Eliminate review of shelf-ready

By doing the above, they found that it freed up catalogers' time for them to be able to concentrate on the "hidden collection", such as 80 year Special Collections rare book, Transportation History collections the Walp Family Juvenile Collection that was donated by Lee Walp....and many other collections. They were also able to spend time working on significant gifts that included (approximately) 200,000 items collection of Sheet Music that consists of American sheet music from the days of ragtime and early jazz and the ever growing collection of e-contents.

Along the way, Abramson-Bluhm says there were lessons learned:

- Clearly identify minimal record
- Determine and document criteria for flagging at the start of the project
- Create and document plan for reviewing flagged records
- Start reviewing records as soon as an end point is reached
- Be prepared to adjust criteria or flag specs (be flexible)
- Minimal vs brief (be clear when talking to vendors)
- All materials do not need to be treated equally
- Unambiguous mechanism for reporting problems and system for correcting them that includes a training component
- It can be done: to move from Public Services to Technical Services
- Vendor turn-around improved with time

OVGTSL Business Meeting Minutes

May 16, 2013

The meeting was called to order at approximately 12:20 PM by Dianne Grayson, University of Southern Indiana.

Introductions and Recognitions

Dianne Grayson introduced the 2012/13 officers:

Chair: Dianne Grayson, University of Southern Indiana

Vice Chair: Margaret Foote, Eastern Kentucky University

Secretary: Carrie Preston, Ohio University

Treasurer: Kelly Smith, Eastern Kentucky University

Margaret Foote recognized the 2013 Conference Planning Committee, the 2013 OVGTSL Scholarship Recipients, and the 2013 conference sponsors. Scholarship recipients were:

Vanessa Bradt, Kent State University

Thomas Goodnow, Indiana University

Jennifer Harris, University of Kentucky

A motion to approve the minutes of the 2012 business meeting was made, seconded, and affirmed by the membership.

Treasurer's Report

The treasurer, Kelly Smith, summarized the report distributed to the membership in their conference packets:

Incoming Balance August 31, 2012: \$10,778.99

Balance as of May 14, 2013: \$15,529.64

Income received: \$15,595.00

Income projected: \$15,925.00

Expense as of May 14: \$8,961.15

Total projected expense: \$13,086.15

Ad Hoc Committee on the OVGTSL Archives Report

Tyler Goldberg reported that the committee prepared bylaws amendment proposal #2 (under *Old Business* below). They also prepared *Guidelines for Archivist Duties*, limited copies of which were distributed at the business meeting.

Old Business

Bylaws amendment: Article IV (Officers and Committees): The text to be amended is underlined.

Section B.2. The Vice-Chairperson (Chairperson-Elect) shall serve as Chairperson whenever the Chairperson is unable to do so. She/he shall serve as the Chairperson of the Planning Committee for the annual spring meeting and may be invited to other committee meetings when it seems advisable. The Vice-Chairperson (Chairperson-Elect) will arrange an independent audit of the books <u>within 30 days</u> of the close of the annual meeting.

Proposed Change: The Vice-Chairperson (Chairperson-Elect) will arrange an independent audit of the books <u>within 90 days</u> of the close of the annual meeting.

This amendment was passed by vote of over 2/3 of members present at the business meeting.

Bylaws amendment: Article IV (Officers and Committees):

Section G: An Archivist shall be elected for a three year term from the membership.

Proposed Addition (underlined): An Archivist shall be elected for a three year term from the membership. <u>The responsibility of the archivist is to collect and preserve the papers and electronic documents of the Ohio Valley Group of Technical Services Librarians</u>. The archivist will solicit, <u>develop, organize, manage, and provide access by means of an inventory to the OVGTSL print and digital archival records</u>. The archivist will manage the transfer of materials to the OVGTSL archives at the University of Kentucky.

This amendment was passed by vote of over 2/3 of members present at the business meeting.

Bylaws amendment: Article VI: Affiliations.

Section C: A website shall be maintained for the Ohio Valley Group of Technical Services Librarians at Western Kentucky University. The URL will be

<u>http://www.wku.edu/Library/ovgtsl/Home.html</u>. The website will contain a brief history of the organization, a list of the current officers, a link to the current annual meeting information, and other appropriate links.

It will be the responsibility of the annual meeting host site to maintain a website at their institution for current annual meeting information and to provide the URL to the website contact at Western Kentucky University for a link to be added to the organization's web site.

Proposed change:

Section C: A website shall be maintained for the Ohio Valley Group of Technical Services Librarians. The website will contain a brief history of the organization, a list of the current officers, a link to the current annual meeting information, and other appropriate links.

It will be the responsibility of the annual meeting host site to maintain a website at their institution for current annual meeting information and to provide the URL to the website contact for a link to be added to the organization's website.

This amendment was passed by vote of over 2/3 of members present at the business meeting.

The chair also proposed that a task force be formed to investigate options for the OVGTSL web site. Carrie Preston, Kelly Smith, and Tyler Goldberg volunteered to serve on this task force.

Bylaws amendment: Article VIII: Privacy statement

The following amendment was proposed at the 2011 annual business meeting:

Section A: Contact information for members is not to be sold or given to vendors or sponsors without permission of the member. Conference registration forms will include an opt in/opt out option for permission to share contact information with conference sponsors if requested by the vendor/sponsor.

This amendment was passed by vote of over 2/3 of members present at the business meeting.

New Business

Dianne Grayson proposed the following slate of officers for 2013/14:

Chair: Margaret Foote, Eastern Kentucky University

Vice Chair: Carrie Preston, Ohio University

Secretary: Valentine Muyumba, Indiana State University

Treasurer: Michael Farmer, Ohio University

Past Chair: Dianne Grayson, University of Southern Indiana

The slate of officers was approved by the members present.

Kathryn Lybarger was nominated to serve as OVGTSL Archivist. A call for additional nominations from the floor was made, but none were received. Lybarger's nomination was seconded and approved by the members present.

Announcements and Adjournment

Carrie Preston announced the OVGTSL 2014 Conference, to take place May 28-30, 2014 in Athens, Ohio.

Door prizes were distributed and the meeting was adjourned at 12:55 PM.



Taemin Park and Andrea Morrison, Indiana University, Presenters of RDA pre-conference



OVGTSL 2013 Planning Committee: Margaret Foote, Krista Rhodus, Laura Edwards, Pennie Centers, Kathryn Turnbull, Kelly Smith, Carol Thomas, Amy Tabb, Victoria Koger (Photo by Melissa Abney)

The photo was taken in the Noel Studio for Academic Creativity, the site of the OVGTSL reception in Crabbe Library, Eastern Kentucky University



Jennifer Harris, University of Kentucky, and Thomas Goodnow, Indiana University, two of the three OVGTSL student scholarship winners (Not pictured: Vanessa Bradt, Indiana University)